Form 1040		Form 1099-R - Keep for y				2005
Name Doris E Lackman					Social Security 1 283-09-956	
Check Applicable Box	1099-R . ► X	CSA-1099-R ~ .	► CSF-	1099-R►		9-R▶□
	Payer Federal ID	. Allianz Lif				
City . 1	Address or P. O. Box Minneapolis address			P 55416		
If Sp	ouse's 1099-R, check this i	bax ►	<u> </u>			
This section is f	or RRB-1099-R use only 					
1 Gross distribution 2 b Taxable amount 3 Capital gain	not determined	13,056.	Total dis	amount (See He tribution tax withheld alized appreciati		13,056.
5 Contributions/In 7 Distribution cod	e(s). 7		A/SEP/SIMPLE	×	Roth IRA	P
12-1 State distribution	eper		State	State use code). (See Help)	
▶ If box 7 code is		Roth IRA distributed in the conversions and re- conversions and re- conversions and re-	tion (see Help) . chase ersion or rechara characterizations	acterization as a s on page 2.	rollover.	
➤ Inherited IRA	If this distribution is from > Spouse and treat as a > Recipient, but was or > Spouse and not treat > Someone other than a	ecipient's own (this iginally inherited in as recipient's own	is is treated as a rom a spouse (tr o (taxable amour	a rollover) eated as recipies at must be in box	nt's IRA) (2a)	
➤ Insurance . ➤ RMD If this Setton	Amount of insurance is a Required Minimum Disgress is RMD	tribution (RMD) ('See Help),			
8 Other 9 a Percentage of I			% Total employee	_		
10-2 State tax within 12-2 State distribution 13-2 Local tax within 15-2 Local distribution	eld eld	11-2	State Name of locality	Payer's state N State use code	o. (See Help)	
Substitute For		click to link to For	m 4852		▶	
Recipient's federal Recipient's name	ion: Correct to match recipi ID283-09			a foreign address	s (see Helip)	
Address 11425 Co Moor Account number			City Strongsvil Corrected	le fon standard	St OH	ZIP code 44149
			, ,			

11/28/05 2 checks 86,528,03 Eileen 6528.03 Dor Case: 1:13-cr-00243-JRA Doc #: 122-6 Filed: 03/14/18 2 of 10. PageID #: 601

me	Social Security Number
oris E LACKMAN	283-09-9564
neck Applicable Box : 1099-R . ► X	CSA-1099-R ► CSF-1099-R ► RRB-1099-R ►
Payer Federal ID	41–1366075
Payer Name	Allianz Life
Name (cont.)	5701 Golden Hills Dr
Street Address or P. O. Box City . Minneapolis	State MN ZIP 55416
Payer has a foreign address	
If Spouse's 1099-R, check this bo	ox▶
This section is for RRB-1099-R use only	
<u></u>	
1 Gross distribution	6, 409. 2 a Taxable amount (See Help) 6, 4
2 b Taxable amount not determined	Total distribution
3 Capital gain	4 Federal tax withheld 6 Net unrealized appreciation
5 Contributos/Desig Roth/Insur 7 Distribution code(s) 7	► IRA/SEP/SIMPLE ► X Roth IRA
	11 -1 State OH Payer's state No.
10-1 State lax withheld	11-1 State OH Payer's state No. State use code (See Help)
12-1 State distribution 6	
15-1 Local distribution	
Entire distribution rolled	onversions and recharacterizations on page 2.
	an inherited IRA, indicate the distribution is from the IRA of
▶ Spouse and treat as re	ecipient's own (this is treated as a follower)
➤ Spouse and treat as re ➤ Recipient, but was original.	ecipient's own (this is treated as a follower) ginally inherited from a spouse (treated as recipient's IRA) Propose Propo
➤ Spouse and treat as re ➤ Recipient, but was orig ➤ Spouse and not treat are ➤ Someone other than a	ecipient's own (this is treated as a rollower) ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a)
➤ Spouse and treat as re ➤ Recipient, but was orig ➤ Spouse and not treat at ➤ Someone other than at ➤ Insurance Amount of insurance g	ecipient's own (this is treated as a rollover) ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A
> Spouse and treat as or Precipient, but was origing to Spouse and not treat in Spouse and not treat in Someone other than a Amount of insurance	ecipient's own (this is treated as a rollower) ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A
➤ Spouse and treat as re ➤ Recipient, but was orig ➤ Spouse and not treat ➤ Someone other than a ➤ Insurance Amount of insurance p ➤ Qualified Charitable Distribution	ecipient's own (this is treated as a rollower) ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization
➤ Spouse and treat as re ➤ Recipient, but was orit ➤ Spouse and not treat a ➤ Someone other than a ➤ Insurance ➤ Qualified Charitable Distribution Et	ecipient's own (this is treated as a rollower) ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization
➤ Spouse and treat as re ➤ Recipient, but was orig ➤ Spouse and not treat ➤ Someone other than a ➤ Insurance Amount of insurance p Cualified Charitable Distribution E RMD If this is a Required Minimum Distribution Entire gross is RMD	ecipient's own (this is treated as a routower) ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (See Help), or the amount of gross distbn that is RMD
➤ Spouse and treat as re ➤ Recipient, but was orit ➤ Spouse and not treat a ➤ Someone other than a ➤ Insurance ➤ Qualified Charitable Distribution Et	ecipient's own (this is treated as a rollower) ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A inter IRA distributions made directly by the trustee o a qualified charitable organization
> Spouse and treat as re	ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (See Help), or the amount of gross distin that is RMD % 9 b Total employee contributions 11.2 State Paver's state No.
> Spouse and treat as re > Recipient, but was orit > Spouse and not treat to Spouse and not treat to Spouse and not treat to Someone other than at Someone other than at Someone other than at Spouse and not treat to Someone other than at Spouse and I sp	ecipient's own (this is treated as a rollower ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (See Help), or the amount of gross distibn that is RMD % 9 b Total employee contributions 11-2 State Payer's state No. State use code (See Help)
> Spouse and treat as re	ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (See Help), or the amount of gross distin that is RMD % 9 b Total employee contributions 11.2 State Paver's state No.
> Spouse and treat as re > Recipient, but was orit > Spouse and not treat to Spouse and not treat to Spouse and not treat to Someone other than at Someone other than at Someone other than at Spouse and not treat to Someone other than at Spouse and I sp	ecipient's own (this is treated as a rollower ginally inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (See Help), or the amount of gross distibn that is RMD % 9 b Total employee contributions 11-2 State Payer's state No. State use code (See Help)
> Spouse and treat as re	ecipient's own (this is treated as a rollower inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (See Help), or the amount of gross distbn that is RMD 9 b Total employee contributions 11-2 State Payer's state No. State use code (See Help) 14-2 Name of locality
Spouse and treat as re Recipient, but was orit Spouse and not treat Someone other than a Insurance Amount of insurance RMD If this is a Required Minimum Dist Entire gross is RMD 8 Other 9 a Percentage of total distribution 10 -2 State tax withheld 12-2 State distribution 13-2 Local tax withheld 15-2 Local distribution Substitute Form 1099-R needed, double-total state of the promute of the	ecipient's own (this is treated as a rollower inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Schedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (See Help), or the amount of gross distbn that is RMD 9 b Total employee contributions 11-2 State Payer's state No. State use code (See Help) 14-2 Name of locality click to-link to Form 4852 ent information on Form 1099-R
> Spouse and treat as re	ecipient's own (this is treated as a rollower inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Scriedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (Sae Help). or the amount of gross distbn that is RMD % 9 b Total employee contributions 11 -2 State Payer's state No. State use code (See Help) 14 -2 Name of locality click to-link to Form 4852 ent information on Form 1099-R
	ecipient's own (this is treated as a rollower inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Scriedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (Sae Help). or the amount of gross distbn that is RMD % 9 b Total employee contributions 11 -2 State Payer's state No. State use code (See Help) 14 -2 Name of locality click to-link to Form 4852 ent information on Form 1099-R
	ecipient's own (this is treated as a rollower inherited from a spouse (treated as recipient's IRA) as recipient's own (taxable amount must be in box 2a) a spouse (taxable amount must be in box 2a) premiums deductible on Scriedule A Enter IRA distributions made directly by the trustee o a qualified charitable organization tribution (RMD) (Sae Help). or the amount of gross distbn that is RMD % 9 b Total employee contributions 11 -2 State Payer's state No. State use code (See Help) 14 -2 Name of locality click to-link to Form 4852 ent information on Form 1099-R

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2007

US 1099-R Distributions from Profit-Sharing, Retirement Plans, IRA's, etc.

This 1099-R is for the: X Taxpayer Check if this 1099-R is handwritten, altered, or appears not to be a true 1099-R. Corrected 1 Gross (RRB line 7) Taxable amount not Payer's ID: 41-1366075 Name code: ALLI determined 6794. 2 Taxable amount Total distribution Payer's name Elect 10 averaging Allianz life 6794. Payer's care of name. Use % for care of. 4 Federal tax withheld 3 Capital gain in line 2 Payer's address 679. 5701 Golden Hills Dr 5 Employee 6 Net Payer's Zip code, city, and state contributions, unrealized 55416 Minneapolis MN **Designated Roth** appreciation in Recipient's social security number: contributions or employer's 283-09-9564 insurance premiums securities Recipient's name 0. Ο. Doris E LACKMAN Recipient's address 7 Codes IRA / SEP/ 8 Other 0.0 % 11425 Co Moor Blvd 7 Simple O. Check if disability and the taxpayer is disabled Strongsville OH 44149 Check to force Form 5329 1st year of designated Roth contribution 9a Percentage of total 9b Total employee Account number (optional) distribution contributions 0.0 % 0. See F1 Help on the state 10 State tax 11 State and state ID no. 12 State distribution return for use of these ο. boxes. instructions vary by state. 0. 0. Check if applies. Box 1 13 Local tax 14 Locality name 15 Local distribution Box 2 0. 0. Box 3 Railroad retirement ο. ο. **Exclusion Worksheet** Amount rolled over ٥. 2 Amount, up to \$100,000, paid directly by the trustee of the IRA to a charitable organization. The donor must have been at least 70 1/2 when the distribution was made 0. 3 Amount rolled over into an HSA. This election is irrevocable and can only be done once in the recipient's lifetime 0 Retired public safety officers - amount, up to \$3,000, paid directly from a qualified governmental plan to pay health or qualified long-term care insurance for the taxpayer, spouse, or dependents 0 -5 Excludable amount due to a tax-free exchange; as calculated in a previous year; or by law, is specifically tax-exempt 0. If the distribution is from a traditional, SEP, or SIMPLE IRA and you ever made nondeductible IRA contributions, check If this is a conversion from a traditional IRA to a Roth IRA,

If PART of this distribution was converted to a Roth IRA,

US 1099-R Distributions from Profit-Sharing, Retirement Plans, IRA's, etc.

2007

	is 1099-R is for the: X	Taxpayer Spouse			
Check if this 1099-R is handw	ritten, altered, or appea	ars not to be a true 1099-R.	Corrected		
Payer's ID: 41-1366075 Name code: ALLI		1 Gross (RRB line 7) 15000.	Taxable amount not determined Total distribution Elect 10 averaging		
Payer's name Allianz Life Payer's care of name. Use % for	care of	2 Taxable amount 15000.			
Payer's address 5701 Golden Hills Dr		3 Capital gain in line 2	4 Federal tax withheld 750. 6 Net unrealized appreciation in employer's securities		
Payer's Zip code, city, and state 55416 Minneapolis	MN	5 Employee contributions, Designated Roth			
Recipient's social security number Recipient's name	er: 283-09-9564	contributions or insurance premiums			
Doris E LACKMAN Recipient's address		7 Codes IRA / SEP /	0. 8 Other 0.0 %		
11425 Co Moor Blvd	·	7 Simple X	0.		
st year of designated Roth contr	OH 44149	Check if disability and the t Check to force Form 5329	axpayer is disabled		
Account number (optional)		9a Percentage of total distribution 0.0 %	9b Total employee contributions		
ee F1 Help on the state eturn for use of these oxes.	10 State tax	11 State and state ID no.	12 State distribution 15000.		
nstructions vary by state. Theck if applies. Tox 1	0.		0.		
ox 2 ox 3	13 Local tax	14 Locality name	15 Local distribution 0.		
Exclusion Worksheet	0.		0.		
1 Amount rolled over 2 Amount, up to \$100,0 charitable organization when the distribution 3 Amount rolled over int only be done once in t 4 Retired public safety of from a qualified gover care insurance for the 5 Excludable amount du in a previous year; or * If the distribution is fro ever made nondeducti	n. The donor must have was made to an HSA. This election he recipient's lifetime fficers - amount, up to namental plan to pay hea taxpayer, spouse, or defeated.	s been at least 70 1/2 n is irrevocable and can \$3,000, paid directly Ith or qualified long-term ependents e; as calculated ex-exempt or SIMPLE IRA and you	0. 0. 0.		

5

- US 1099-R

Distributions from Profit-Sharing, Retirement Plans, IRA's, etc.

2008

•	is 1099-R is for the: X	Taxpayer Spouse				
Check if this 1099-R is handwri	tten, altered, or appears	not to be a true 1099-R.	Corrected			
Payer's ID: 41-1366075 Name code: ALLI		1 Gross (RRB line 7) 7500.	Taxable amount not determined			
Payer's name	A de la companya de l	2 Taxable amount 7500.	Total distribution Elect 10 averaging			
Payer's care of name. Use % for c Payer's address	are of.	3 Capital gain in line 2	4 Federal tax withheld			
701 Golden Hills Dr Payer's Zip code, city, and state		5 Employee	6 Net			
55416 Minneapolis Recipient's social security number	4	contributions, Designated Roth contributions or	unrealized appreciation in employer's			
Recipient's name	283-09-9564	insurance premiums	securities			
Doris E LACKMAN Recipient's address		7 Codes IRA / SEP /	8 Other 0.0 %			
11425 Co Moor Blvd		7 Simple	0.			
Strongsville	OH 44149	Check if disability and the tag Check to force Form 5329	xpayer is disabled			
Ist year of designated Roth contri Account number (optional)	виноп	9a Percentage of total distribution 0.0 %	9b Total employee contributions			
See F1 Help on the state return for use of these poxes.	10 State tax	11 State and state ID no.	12 State distribution 0.			
nstructions vary by state. Check if applies.	0.		0.			
Box 1 Box 2 Box 3	13 Local tax	14 Locality name	15 Local distribution 0.			
Railroad retirement Exclusion Worksheet	0.		0.			
when the distribution 3 Amount rolled over in only be done once in 4 Retired public safety from a qualified gove care insurance for the 5 Excludable amount d in a previous year; or	on. The donor must have was made to an HSA. This election the recipient's lifetime officers - amount, up to rnmental plan to pay hea a taxpayer, spouse, or due to a tax-free exchanger by law, is specifically to ma traditional, SEP, com a traditional services at the company of the company	s been at least 70 1/2 is irrevocable and can \$3,000, paid directly Ith or qualified long-term ependents e; as calculated ax-exempt or SIMPLE IRA and you	0. 0. 0.			

US 1099-R

Distributions from Profit-Sharing, Retirement Plans, IRA's, etc.

2008

Check if this 1099-R is handwri	tten, altered, or ap	or appears not to be a true 1099-R.						
Payer's ID: 41-1366075 Name code: ALLI		1	Gross (RRB line 7) 7050.		xable amount not termined			
Payer's name Allianz Life Payer's care of name. Use % for co	oro of	2	Taxable amount		tal distribution ect 10 averaging			
Payer's address	a e oi.	3	Capital gain in line 2	4	Federal tax withhe			
5701 Golden Hills Dr Payer's Zip code, city, and state		5	Employee	6	Net			
55416 Minneapolis		MN	contributions, Designated Roth		unrealized appreciation in			
Recipient's social security number	283-09-95	564	contributions or insurance premiums		employer's securities			
Recipient's name Doris E LACKMAN		_	0 -		0.			
Recipient's address 11425 Co Moor Blvd		7	Codes IRA / SEP / 7 Simple 3		Other 0.0			
Strongsville	OH 44149		heck if disability and the	taxpaye	r is disabled			
1st year of designated Roth contri	oution		heck to force Form 5329 Percentage of total	Q b	Tatal annulasses			
Account number (optional)		Ja	distribution 0.0 %	30	Total employee contributions			
See F1 Help on the state return for use of these	10 State tax	0. OH		12	State distribution			
boxes. Instructions vary by state.		0. OH			7050.			
Check if applies. Box 1	13 Local tax		1 P	2 -				
Box 2	15 Local tax	0.	Locality name	15	Local distribution			
Box 3 Railroad retirement		0.			0.			
Exclusion Worksheet								
1 Amount rolled over								
2 Amount, up to \$100,0 charitable organizatio	00, paid directly by	y the truste	ee of the IRA to a		0.			
when the distribution	was made				0.			
3 Amount rolled over in only be done once in t	to an HSA. This ele	ection is in	revocable and can					
4 Retired public safety of	officers - amount, u	up to \$3.00	0, paid directly		0.			
from a qualified gover	nmental plan to pay	y health or	qualified long-term					
care insurance for the 5 Excludable amount du	taxpayer, spouse,	or depen	dents		0.			
in a previous year; or	by law, is specific	ally tax-ex	calculated emot					
* If the distribution is fro	om a traditional, SI	EP, or SIN	IPLE IRA and you		0.			
ever made nondeducti	ble IRA contributio	ns, check						
* If this is a conversion check	rrom a traditional II	KA to a Ro	th IKA,		464 Ty S. 1			
		d to a Roth			and the second of the second o			

Distributions from Profit-Sharing, Retirement Plans, IRA's, etc. 2009 This 1099-R is for the: x Taxpayer Check if this 1099-R is handwritten, altered, or appears not to be a true 1099-R. Payer's ID: Corrected 41-1366075 Name code: 1 Gross (RRB line 7) ALLI Taxable amount not 6774. Payer's name determined Allianz life 2 Taxable amount Payer's care of name. Use % for care of. Total distribution 6774 Elect 10 averaging Payer's address 3 Capital gain in line 2 5701 Golden Hills Dr 4 Federal tax withheld Payer's Zip code, city, and state 677. 55416 5 Employee Minneapolis 6 Net contributions, MN Recipient's social security number: unrealized Designated Roth 283-09-9564 appreciation in contributions or Recipient's name employer's insurance premiums Doris E Lackman securities 0. Recipient's address ٥. 11425 Co Moor Blvd 7 Codes IRA / SEP / 8 Other 0.0 % Simple Strongsville 0. OH 44149 Check if disability and the taxpayer is disabled 1st year of designated Roth contribution Check to force Form 5329 Account number (optional) Percentage of total 9b Total employee distribution contributions See F1 Help on the state 0.0 % 10 State tax return for use of these 11 State and state ID no. boxes. 12 State distribution Ο. Instructions vary by state. Check if applies. ο. ο. Box 1 13 Local tax Box 2 0. 14 Locality name 15 Local distribution Box 3 Ο. Railroad retirement **Exclusion Worksheet** ٥. Amount rolled over Amount, up to \$100,000, paid directly by the trustee of the IRA to a charitable organization. The donor must have been at least 70 1/2 0. when the distribution was made Amount rolled over into an HSA. This election is irrevocable and can only be done once in the recipient's lifetime 0. Retired public safety officers - amount, up to \$3,000, paid directly from a qualified governmental plan to pay health or qualified long-term care insurance for the taxpayer, spouse, or dependents 0. 5 Excludable amount due to a tax-free exchange; as calculated in a previous year; or by law, is specifically tax-exempt 0. If this is a Qualified Disaster Recovery Assistance Retirement Plan Distribution for Form 8930, check here If the distribution is from a traditional, SEP, or SIMPLE IRA and you 0. ever made nondeductible IRA contributions, check here If this is a conversion from a traditional IRA to a Roth IRA,

Case: 1:13-cr-00243-JRA Doc #: 122-6 Filed: 03/14/18 8 of 10. PageID #: 607

US 1099-R Distributions from Profit-Sharing, Retirement Plans, IRA's, etc.

	ndwritten, altered, or appea	rs not to be a true 1099-R.				
Payer's ID: 41-136607! Name code: ALLI		1 Gross (RRB line 7)	Taxable amount not			
Payer's name Allianz Life Payer's care of name. Use %	for care of.	2 Taxable amount 7500.	determined Total distribution Elect 10 averaging			
Payer's address		3 Capital gain in line 2	4 Federal tax withheld			
Payer's Zip code, city, and st 55416 Minneapo		5 Employee contributions,	6 Net			
Recipient's social security nur	1414	Designated Roth contributions or	unrealized appreciation in			
Recipient's name		insurance premiums	employer's securities			
Doris E Lackman Recipient's address		-	0.			
11425 Co Moor Blvd		7 Codes IRA / SEP / Simple	8 Other 0.0 %			
Strongsville	OH 44149	Check if disability and the ta Check to force Form 5329	expayer is disabled			
1st year of designated Roth co	ntribution					
Account number (optional)		9a Percentage of total distribution 0.0 %	9b Total employee contributions			
See F1 Help on the state return for use of these boxes.	10 State tax	11 State and state ID no.	12 State distribution			
Instructions vary by state. Check if applies. Box 1	0.		7500. 0.			
Box 2 Box 3	13 Local tax	14 Locality name	15 Local distribution			
Railroad retirement	0.		0.			
Exclusion Workshee	t		0.			
1 Amount rolled over 2 Amount, up to \$100 charitable organizat	,000, paid directly by the tru ion. The donor must have b	istee of the IRA to a	0.			
3 Amount rolled over i	nto an UCA TL:	irrevocable and can	0.			
4 Retired public safety	- Profit & McMile		0-			
care insurance for the 5 Excludable amount of in a previous year:	e taxpayer, spouse, or depolue to a tax-free exchange; a	or qualified long-term endents as calculated	0.			
* If this is a Qualified D Plan Distribution for If the distribution is fi ever made nondeduce	issaster Recovery Assistance Form 8930, check here from a traditional, SEP, or S	exempt Retirement IMPLE IRA and you	0.			
It this is a conversion	from a traditional IRA to a R	oth IRA.				

9

2010 PENSIONS AND ANNUITIES SUMMARY ATTACHMENT

Doris E Lackman 283-09-9564

	Payer Name	Payer's Federal EIN	T Of S	Pension Amount	Taxable Amount	Capital Gain Incl in Box 2a	Federal Tax Withheld	Distrib Code	IRA/ SEP/ SMPL	State	State Tax Withheld	Local Tax Withheld
•	Allianz life EATON VANCE STRATEGIC CAPITAL BANK AND TRUS CAPITAL BANK AND TRUS CB&T CB&T IFA CB&T IFA CB&T ICA	95-6817943	T T T T T	7,500 681 2,081 3,408 349 4,369 2,672 1,754	7,500 681 2,081 3,408 349 4,369 2,672 1,754		750 68 208 341 35 437 267 175	7 7 7 7 7	X X X X X	OH OH OH OH OH OH		
	EV Larg Cap TOTAL IRAS	04-6006714	T	700 23,514	700 23,514		70 2,351	7	X	OH		
	Metropolitan LIFE INS Allianz Life TOTAL PENSIONS	13-5581829 41-1366075		30 6,491 6,521	30 6,491 6,521		649 649	7 7		OH OH		
	TOTAL 1099Rs	•		30,035	30,035		3,000					

VA Copyright Forms (Software Only) - 2010 TW CIESTED 10 WZPLG:

No. 6385215

P.O. Box 59060 Minneapolis, Minnesota 55459-0060 1-800-950-1962 Check Date: 02/02/2011

February 2, 2011

Re: Partial Surrender on Policy/Contract Number 6754187 DORIS E LACKMAN

Dear client:

The attached check in the amount of \$7,800.00 represents a partial surrender from your annuity policy/contract. Your policy/contract values have been adjusted to reflect the partial surrender. An explanation of the values related to a partial surrender is in your policy/contract. We have deducted \$15.00 for shipping charges.

Please be advised that \$8,683.33 will be reported to the IRS as taxable for the current tax year. Policyholder/contract owners under the age of 59 ½ may be subject to certain IRS premature distribution penalties. Consult your attorney or tax advisor for specific details. Federal income tax has been withheld in the amount of \$868.33.

If you have any questions, please feel free to contact your agent or call us at 800.950.1962.

Policyholder Benefits Allianz Life Insurance Company of North America

C: EILEEN FERN Office Number 000043450